CALJOBS TRAINING

SETTING UP ALERTS AND CREATING A SEARCH LIST FOR YOUR CASELOAD

Click the Computer Icon to watch a training video on this process.

This presentation will explain the process of setting alerts and creating a search list in CalJOBS.
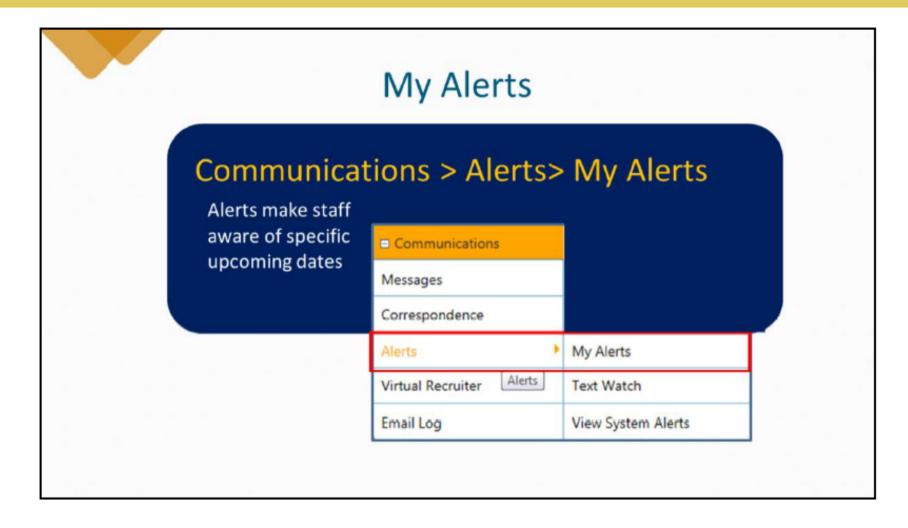
Setting Up Alerts for Your Caseload

- Alerts make staff aware of important upcoming dates for individuals on their caseload
- Helpful alerts include:
  - WIOA Activity Projected Start Date
  - WIOA Activity Projected End Date
  - IEP Goals
  - WIOA Soft Exit
  - WIOA Follow-Up

In order to use **Alerts,** you must have Case Management Groups created for your office. This is because the language of the alerts reads: "notify when an individual in your caseload...".
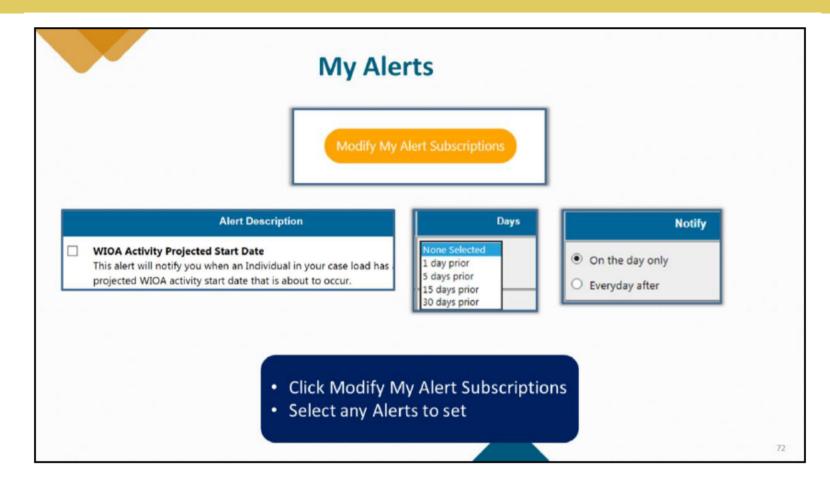
You must assign yourself as the case manager of the individual in the program application to add them to your caseload.

Alerts are a helpful feature for case managers.

From the **Communications** left navigation menu, hover over **Alerts.**

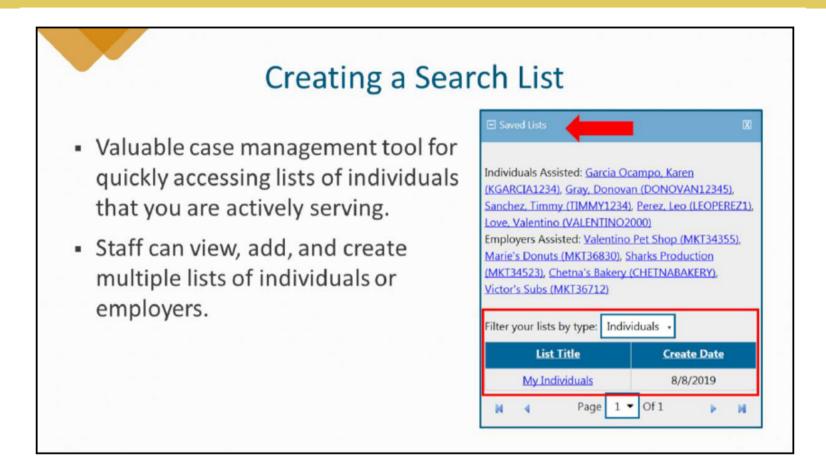Select **My Alerts** from the fly-out menu.

Click **Modify My Alert Subscriptions** and select which alerts from the list you would like to set.

Alerts are listed by category: Individual Registrant, Job Order Alerts, Eligible Training Provider, Wagner-Peyser, WIOA (Title I), Trade Adjustment Assistance, Generic Program, Miscellaneous, IEP, and Employer-Profile alerts.

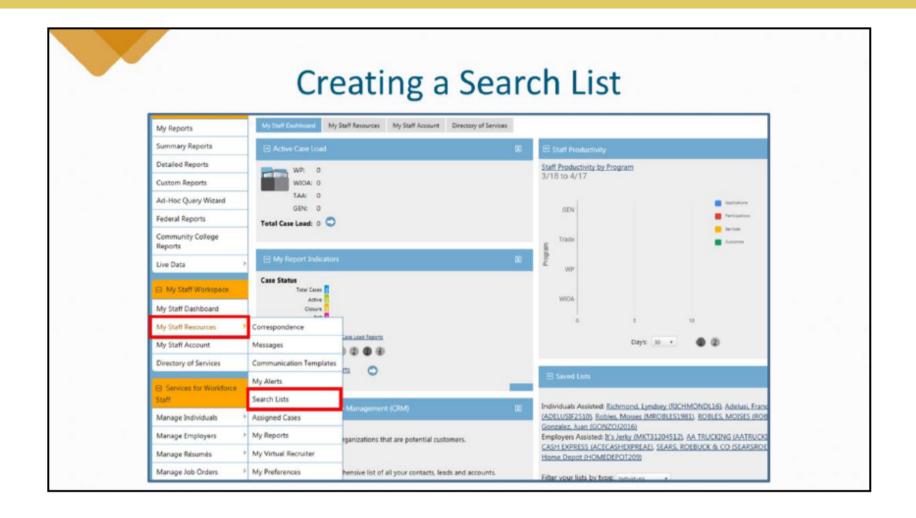| Workforce Innovation and Opportunity Act (WIOA) Alerts		
Alert Description	**Days**	**Notify**
☑ **WIOA Activity Projected Start Date** This alert will notify you when an Individual in your case load has a projected WIOA activity start date that is about to occur.	1 day prior ▾	○ On the day only ● Everyday after
☐ **WIOA Activity Projected End Date** This alert will notify you when an Individual in your case load has a projected WIOA activity end date that is about to occur.	None Selected ▾	● On the day only ○ Everyday after
☐ **WIOA Soft Exit** This alert will notify you when an Individual in your case load is about to soft exit from the WIOA program.	None Selected ▾	● On the day only ○ Everyday after
☐ **WIOA Male Participants about to turn 18** This alert will notify you when an Individual in your case load is about to turn 18 years of age.	None Selected ▾	● On the day only ○ Everyday after
☐ **WIOA Younger Youth Goals About to Expire** This alert will notify you when an Individual with Youth Goals is about to expire where the status is set but attainment is pending.	None Selected ▾	● On the day only ○ Everyday after
☐ **WIOA Participants expiring work authorization** This alert will notify you when an Individual in your case load whose authorization to work is about to expire.	None Selected ▾	● On the day only ○ Everyday after
☐ **WIOA Followup Alert** This alert will notify you when an Individual in your case load has a follow-up date that is nearing.	None Selected ▾	● On the day only ○ Everyday after
☐ **WIOA Literacy Numeracy Pre-Test has not been posted** This alert will notify you when a Youth is enrolled that meets the requirement for literacy numeracy testing has not had a pre-test posted within 60 days of their first youth service date.	None Selected ▾	● On the day only ○ Everyday after
☐ **WIOA Pre-Applications Pending** This alert will notify you of pending WIOA Pre-Applications that are completed by individuals.	N/A	N/A
☐ **WIOA Literacy Numeracy Post-Test has not been posted** The following individual(s) in your case load who have Literacy Numeracy Pre-tests approaching their anniversary date in XX days XX (From Number of Days (e.g. 15)) as of SYSTEM DATE. You should update the literacy numeracy records appropriately.	None Selected ▾	● On the day only ○ Everyday after
☐ **Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity** This alert will notify you when an Individual in your case load has not generated any new WIOA activity since the number of days specified.	None Selected ▾	● On the day only ○ Everyday after

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Click in the box to the left of the **Alert Description** you would like to select, then indicate when you would like to receive the alert in the **Days** column.

 Finally, indicate whether you would prefer to receive the alert on the **On the day only** or **Everyday after**.
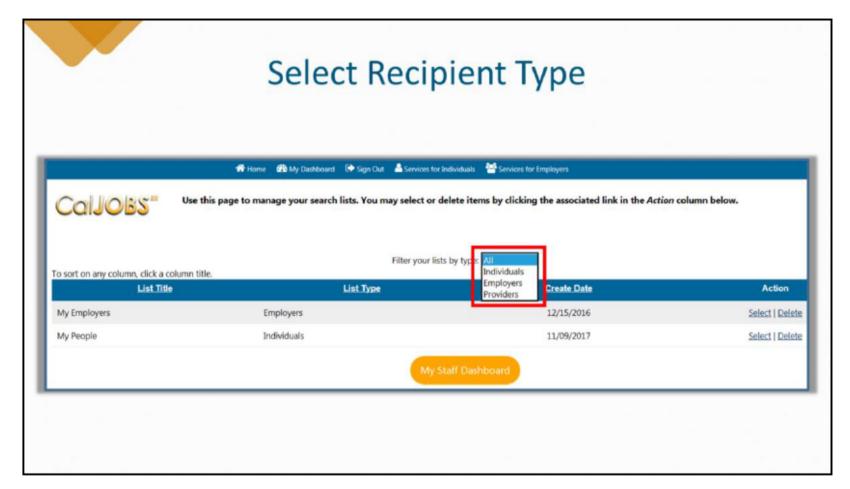
Creating a Search List

- Valuable case management tool for quickly accessing lists of individuals that you are actively serving.

- Staff can view, add, and create multiple lists of individuals or employers.

Saved Lists

Individuals Assisted: Garcia Ocampo, Karen (KGARCIA1234), Gray, Donovan (DONOVAN12345), Sanchez, Timmy (TIMMY1234), Perez, Leo (LEOPEREZ1), Love, Valentino (VALENTINO2000)
Employers Assisted: Valentino Pet Shop (MKT34355), Marie's Donuts (MKT36830), Sharks Production (MKT34523), Chetna's Bakery (CHETNABAKERY), Victor's Subs (MKT36712)

Filter your lists by type: Individuals

List Title	Create Date
My Individuals	8/8/2019

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Search Lists are an excellent case management tool to quickly access lists of individuals on caseload or employers actively serving.
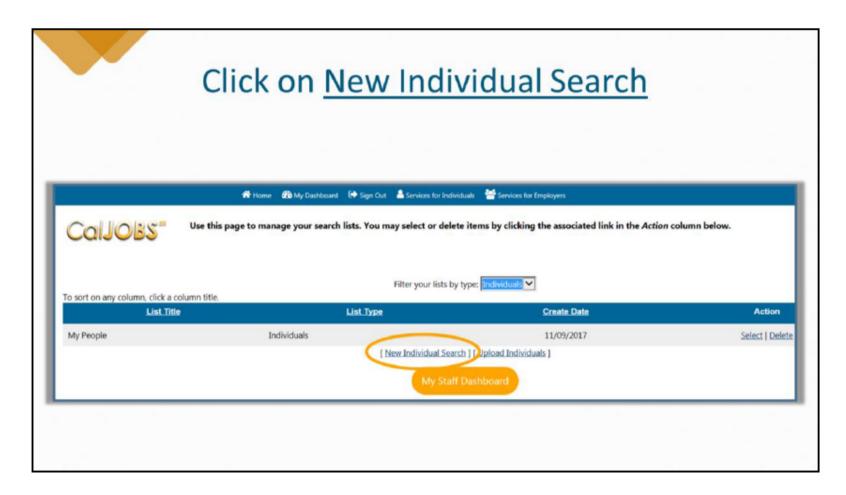
Staff can view, add, and delete multiple users and create multiple lists. **Search Lists** can be accessed from the **Search Lists** option within the **My Staff Resources** section from the left-hand menu.

Creating a Search List

Search Lists are an excellent case management tool to quickly access lists of individuals on caseload or employers actively serving. Staff can view, add, and delete multiple users and create multiple lists. **Search Lists** can be accessed from the **Search Lists** option within the **My Staff Resources** section from the left-hand menu.

Lists can be created for individuals, employers, or providers. From the drop-down select the type of list you would like to create or edit, and existing lists will populate or you will have the option to create a new one.

In this example, we selected the **"Individuals"** option. Next, we will select the **New Individual Search** link to add individuals to an existing list.

On the results page, select the box for the individual(s) we would like to add to the list. Then, select the **Update Existing List** link. A pop-up will appear near the bottom of the page where you choose which list you would like to update with the new individual(s).

Note: If you were creating a brand new list, not editing an existing list, the **Update Existing List** link would read **Create a new List**, and the pop-up box would instruct you to name the new list you are creating.